User Interface 2.0: Screen-by-Screen
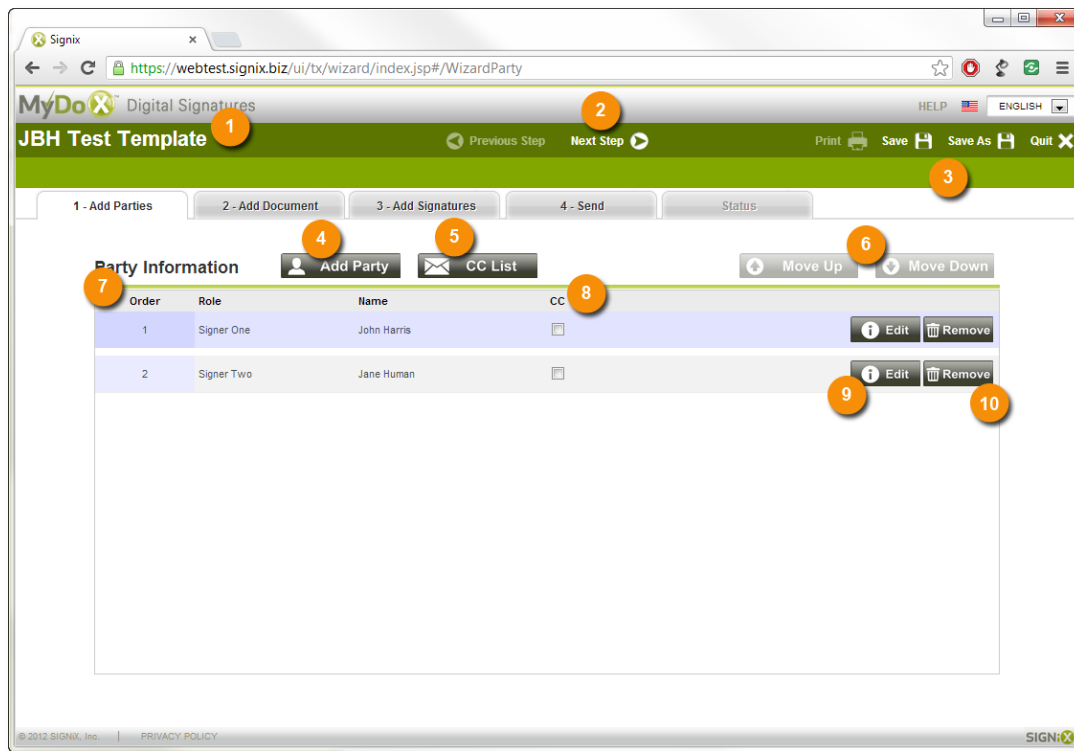
## Document Preparation & Transaction Controls

December 2012

Add Parties

1. **Transaction Title.** This is set in the Send tab or preset* by the system.
2. **Previous / Next Step.** Click or tap either to move forward and backward in tab order to the previous or next step.
3. **Transaction Controls.** [NOTE: These controls are available in every tab.] (a) Print: Print documents in view. (b) Save: Save current transaction. (c) Save As: Save the current transaction as a transaction in process or a template for re-use. (d) Quit: Leave the transaction / document preparation screens to go back to the Document Center or back to the screen that brought you here.* If you have not saved before quitting, you will be prompted to.
4. **Add Party.** Click or tap this to add a new party to the transaction and then enter information for that party.
5. **CC List.** Create a list of users that will receive a copy of the signed document(s) once the transaction is complete.
6. **Move Up / Move Down.** Select a party and then use these controls to change the order of signers in a workflow. You can also create sequential and parallel signers by tapping these buttons and making the order number of the parties (7) the same.
7. **User List and Order.** Displays parties and their order in the transaction. If parties display the same order number, they will both receive the notification to sign at the same time (also known as 'parallel' / 'concurrent' signing). This can be changed using the Move Up / Move Down buttons (6).
8. **CC checkbox.** Checking this box adds the Party to the CC List. See 5.
9. **Edit.** Selecting this open up the Edit Party dialog, allowing you to change name, email, authentication, etc.
10. **Remove.** This control will delete the user and their associated tasks from the transaction.

*Integrated versions

Add Documents
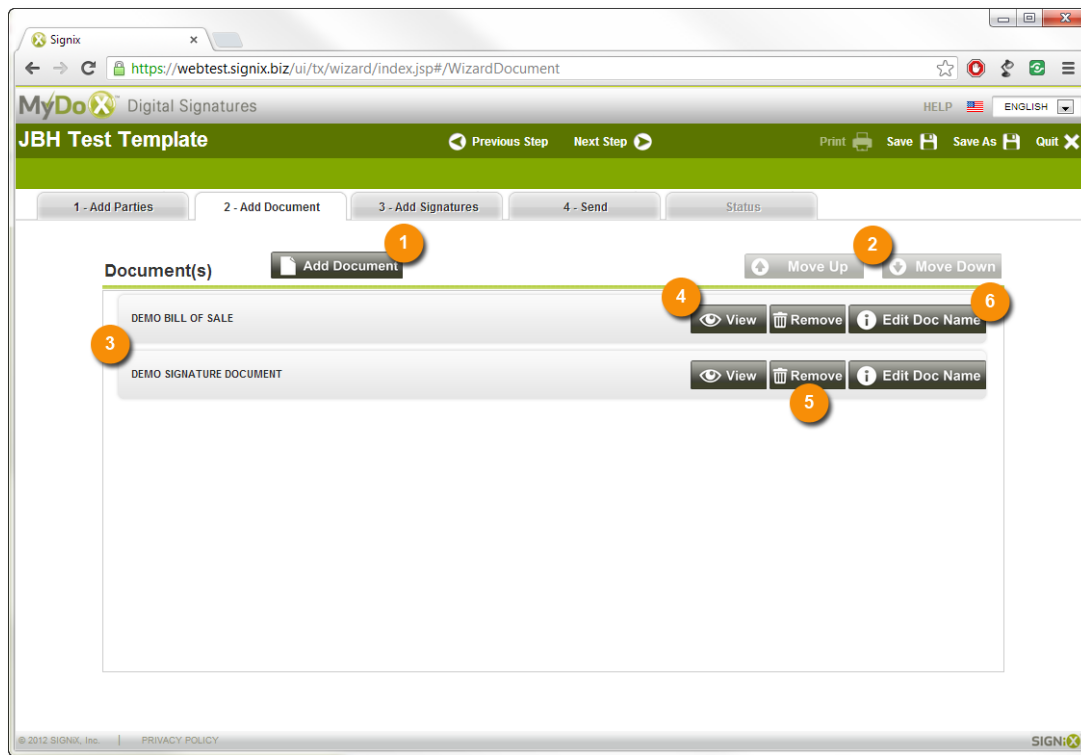
1. **Add Document.** Select this to upload documents from your computer and add them to the transaction.
2. **Move Up / Move Down.** Select a document and then use these controls to change the order of that document in the workflow.
3. **Document List.** Displays a list of documents currently associated with the transaction, in order.
4. **View.** Display the document selected.
5. **Remove.** Delete the document from the transaction.
6. **Edit Doc Name.** Change the name of the document displayed to the user. Changes will be reflected in the document names (3).

Add Signatures
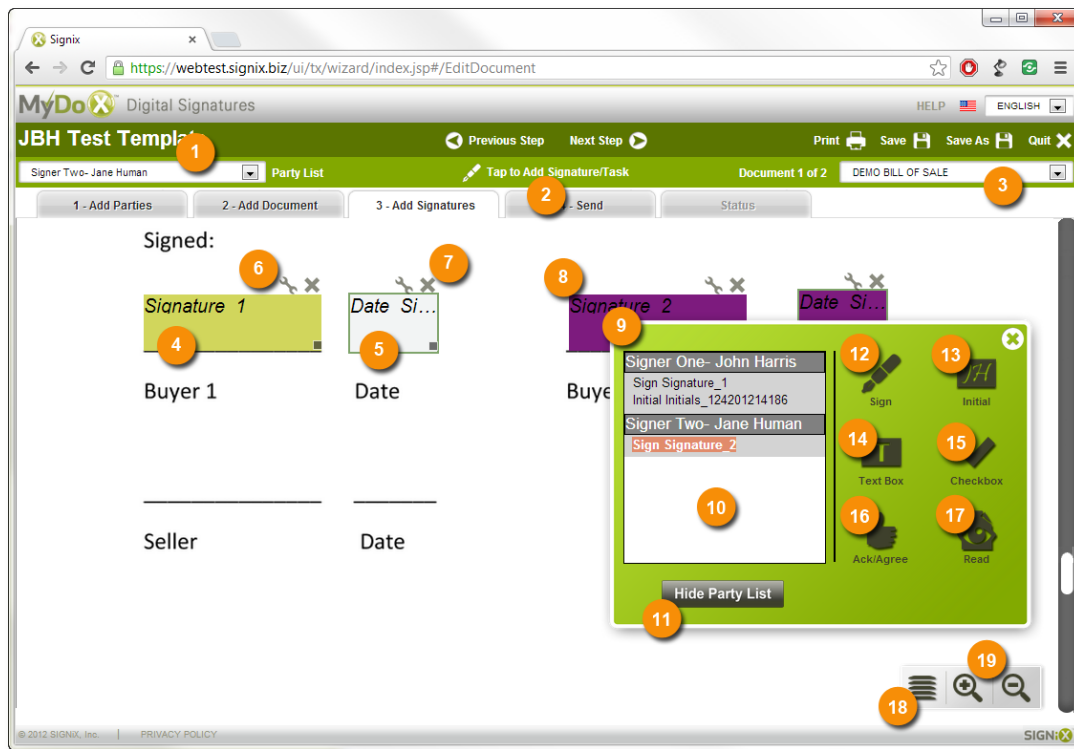
1. **Party List.** Drop down to view and choose the current party tasks will be assigned to. You can also choose the party from the Party List (10).

2. **Tap to Add Signature/Task.** Opens the tool palette (9) if it is not already displayed.

3. **Document List.** Displays which document is being displayed out of the total number of documents in the transaction. Drop down to view and choose documents to edit and add signatures and other tasks to.

4. **Unselected Signature Field.** This signature field is not currently selected. Signature fields can be resized on PC / Mac by dragging the small grey rectangle at the bottom right corner. On tablets, a pinch zoom gesture with two fingers will resize the fields.

5. **Associated, Unselected Date Field.** Date fields can be added to accompany a signature field, and will automatically be filled in with the time of the signature. Date fields can be chosen by checking the Include Date Field checkbox in the Signature or Initial Edit Properties box and pressing Apply.

6. **Edit Properties icon.** Tapping this icon will open the Edit Properties screen for the field it is attached to.

7. **Delete Field icon.** Tapping this icon will delete the field it is attached to.

8. **Selected Signature Field.** This signature field is selected, due to its purple color. You can also see this signature is highlighted in the Party List (10). Signature fields can be resized on PC / Mac by dragging the small grey rectangle at the bottom right corner. On tablets, a pinch zoom gesture with two fingers will resize the fields.

9. **Floating Tool Palette.** This palette can be moved around freely and closed by hitting the X in the upper right hand corner. It can then be re-opened by selecting the Tap to Add Signature/Task control (2) or the Palette control (18). All of the available fields that can be placed on a document are accessible from this palette. By default, the palette will open with the Party List (10) displayed. Simply click a user and then drag and drop a task from the palette (such as a signature) onto the document. To hide the Party List, tap the Hide Party List button (11). To re-display it, press the Display Party List button.
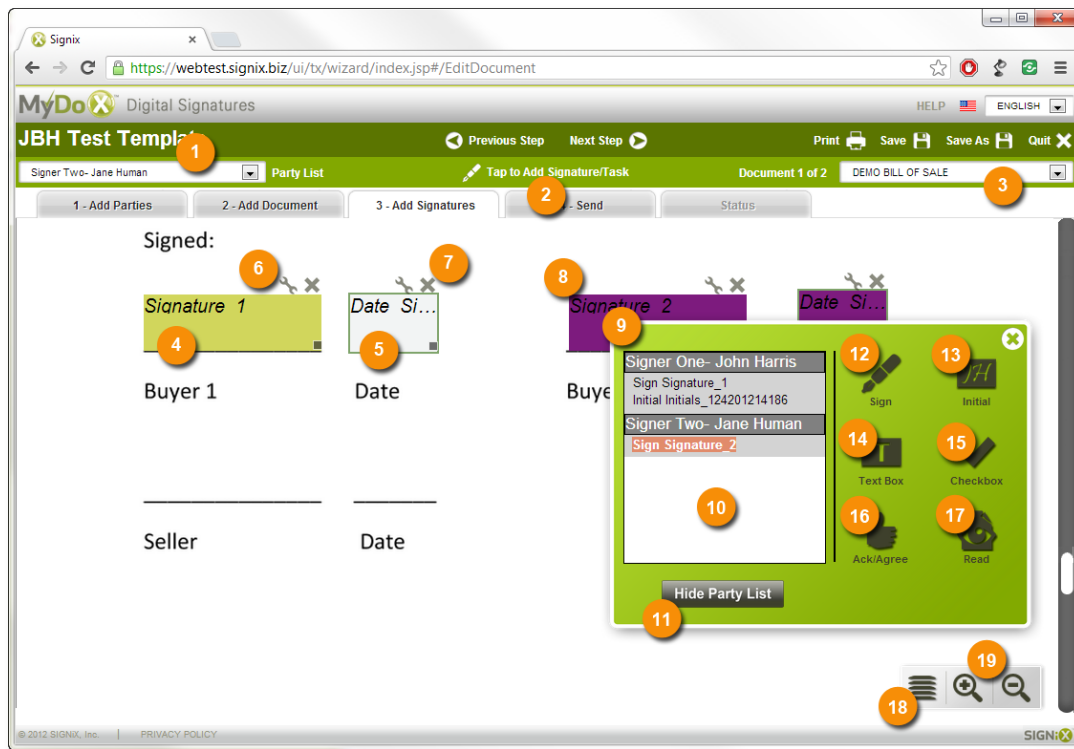
10. **Party List.** All of the Parties currently in the transaction are listed here. By default, the palette will open with the Party List (10) displayed. Simply click a user and then drag and drop a task from the palette (such as a signature) onto the document. To hide the Party List, tap the Hide Party List button (11). To re-display it, press the Display Party List button.

11. **Hide Party List.** To hide the Party List and show more of the document, tap this button. To re-display it, press the Display Party List button.

12. **Signature.** Drag-and-drop this into the document to add a signature field for the currently selected Party. After the field is placed, the Edit Properties dialog will pop-up. In Edit Properties, the label can be changed, date fields and signature blocks (Printed Name, Title, Company) added, and the field made mandatory or optional.

13. **Initial.** Drag-and-drop this into the document to add an initial field for the currently selected Party. After the field is placed, the Edit Properties dialog will pop-up. In Edit Properties, the label can be changed, date fields added, and the field made mandatory or optional.

14. **Text Box.** Drag-and-drop this into the document to add a text box for the currently selected Party. Note that a signature or initial field for the party must be selected first. After the field is placed, the Edit Properties dialog for the field will pop-up. In Edit Properties, the label can be changed, the field can be made mandatory or optional, a default value added and editing rights changed.

15. **Checkbox.** Drag-and-drop this into the document to add a checkbox for the currently selected Party. Note that a signature or initial field for the party must be selected first. After the field is placed, the Edit Properties dialog will pop-up. In Edit Properties, the label can be changed, the field can be made mandatory or optional, a default value added and editing rights changed.

16. **Acknowledge / Agree.** Drag-and-drop this into the document to add an agree or acknowledgement task for the currently selected Party. Note that no other tasks can be added to the document if this task is added. After the field is placed, the Edit Properties dialog will pop-up where you can choose whether the Party will be presented with an Agree or Acknowledge button and text.
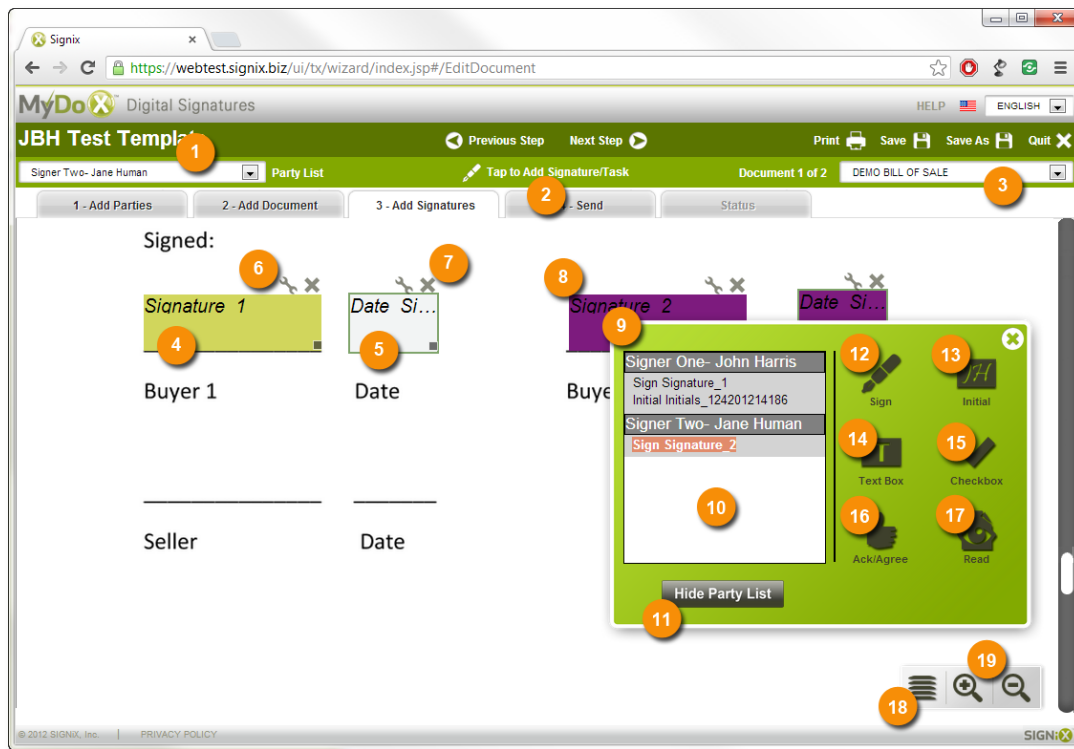
17. **Read.** Drag-and-drop this into the document to allow the current selected Party to read the document, only if the party does not have tasks assigned on that document.
18. **Palette.** Tap this button to display the Floating Tool Palette (9) if it is not currently displayed.
19. **Zoom Controls.** Zoom in (+) or zoom out (-) of the currently displayed document.*

*Pinch to zoom is not currently enabled for tablet users.

Send

1. **Transaction Title.** Change the name of the transaction.
2. **Demonstration Mode.** (This may or may not be displayed depending on your account type.) Selecting Yes uses different certificates, appends usernames with a DEMO name in the audit trail, and is intended primarily for marketing, testing and training.
3. **Description.** Enter a small description of the transaction.
4. **Message Body.** Enter the message that will be displayed to the Parties when they receive notification to sign and review the document(s) in the transaction. Note that SIGNiX will append the link to the transaction to this email.
5. **Send.** When all of the details for the transaction are complete, hitting Send when start the transaction and notify signers in the order they were set in the Add Parties tab.

Status of In-Process Transaction
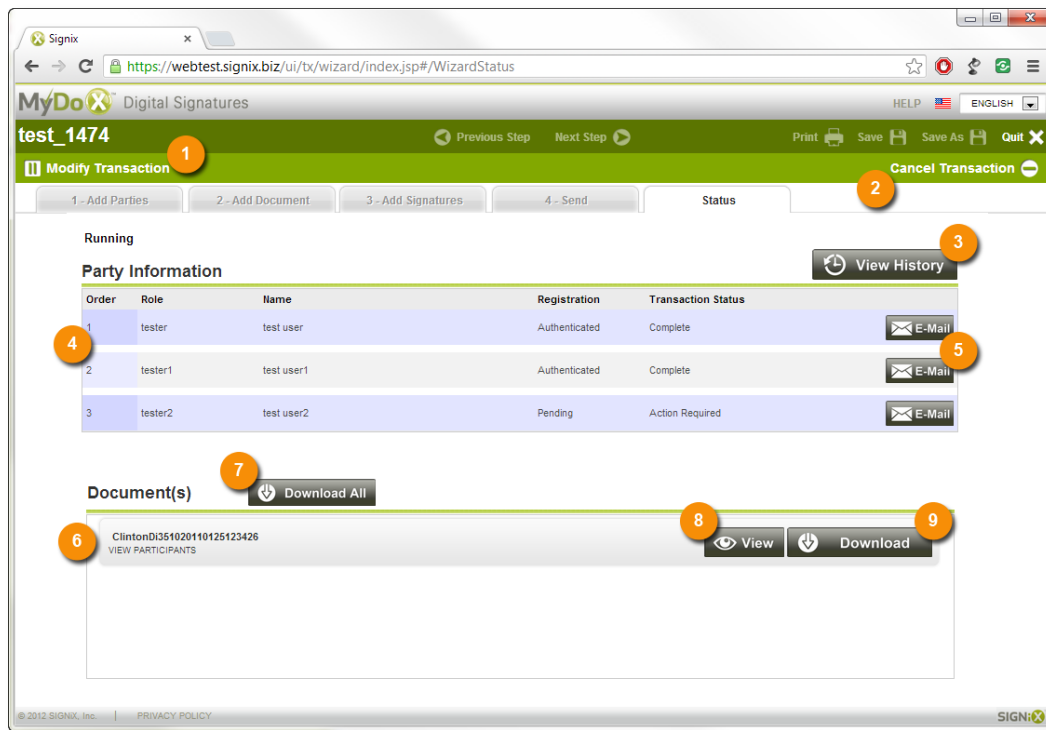
1. **Modify Transaction.** Pauses the transaction to allow for modifications to be made, such as editing parties, adding documents, etc. Once paused, the tabs will be accessible. When the changes are finished, simply tap Resume Transaction to continue the transaction where it left off.
2. **Cancel Transaction.** Cancels the transaction.
3. **View History.** Opens a new window showing a complete audit trail for the transaction to that point. Individual line items can be expanded or collapsed by clicking the (+) icon, or simply tap the Collapse All or Expand All buttons.
4. **Party List.** Lists all current parties to the transaction, as well as providing status as to whether they have authenticated and completed their tasks.
5. **E-mail.** Opens a dialog allowing delivery of new e-mails to parties from within the interface. The subject and message of the email can be customized, and the pick-up link for the transaction can be added to the e-mail in the case of a lost or misplaced message.
6. **Document List.** Lists all documents in the transaction.
7. **Download All.** Downloads a ZIP file containing all of the documents (in their current state: signed, unsigned, partially completed) as well as a PDF version of the audit trail to that point in the transaction.
8. **View.** Take a quick look at the document without downloading it.
9. **Download.** Downloads a PDF of the document in its current state: signed, unsigned, partially completed, etc. Does not download the audit trail.

Status of Completed Transaction
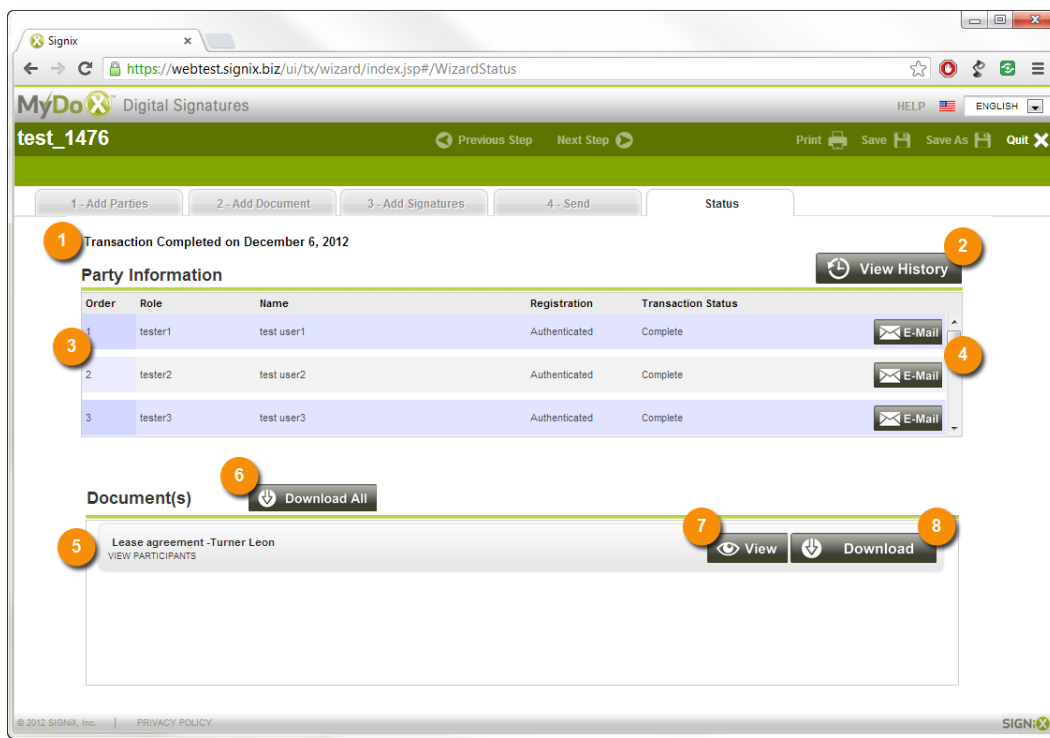
1. **Completion Statement.** Date the transaction was completed.
2. **View History.** Opens a new window showing a complete audit trail for the transaction. Individual line items can be expanded or collapsed by clicking the (+) icon, or simply tap the Collapse All or Expand All buttons.
3. **Party List.** Lists all parties to the transaction
4. **E-mail.** Opens a dialog allowing delivery of new e-mails to parties from within the interface. The subject and message of the email can be customized.
5. **Document List.** Lists all documents in the transaction.
6. **Download All.** Downloads a ZIP file containing all of the documents as well as a PDF version of the audit trail.
7. **View.** Take a quick look at the document without downloading it.
8. **Download.** Downloads a PDF of the document. Does not download the audit trail.